Data Exchange – Internal Components
Applying a Digital Signature to a PDF

June 2018

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DISCLAIMER: SSA includes the following instructions for using Adobe, and disclaims any liability caused by your use of this product.

IMPORTANT: Before beginning this tutorial, make sure that the document you are digitally signing is in PDF format. If not, please use Adobe's how-to guide – How to convert a Word file to a protected PDF in Microsoft Office for Windows.

How to convert a Word, Excel, or PowerPoint file to a protected PDF in Microsoft Office for Windows:

1. Open a file in an Office application.

2. Click Create PDF in the Acrobat ribbon.

3. Select Protect PDF in the resulting dialog box.

4. In the next dialog box, set up a password and file permissions as desired to restrict people from copying or editing the file.

A. Purpose

This document provides the necessary information, policy, and procedures for a seamless adoption of certificate-based digital signatures in the Social Security Administration's (SSA) data exchange line of business.

B. Applicability

This document establishes the necessary steps for using Adobe Reader or Adobe Acrobat to apply a certificate-based digital signature to a data exchange business document PDF or a scanned PDF document with approved digital signature use.

C. Requirements

Resources required to complete this procedure includes Adobe Reader or Adobe Acrobat software.

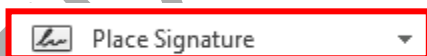## D. Procedure for Signing a PDF Document without a Preset Signature Box

a. Insert your Smart Card credential into the card reader.

b. Open the PDF file with Adobe Acrobat or Adobe Reader.
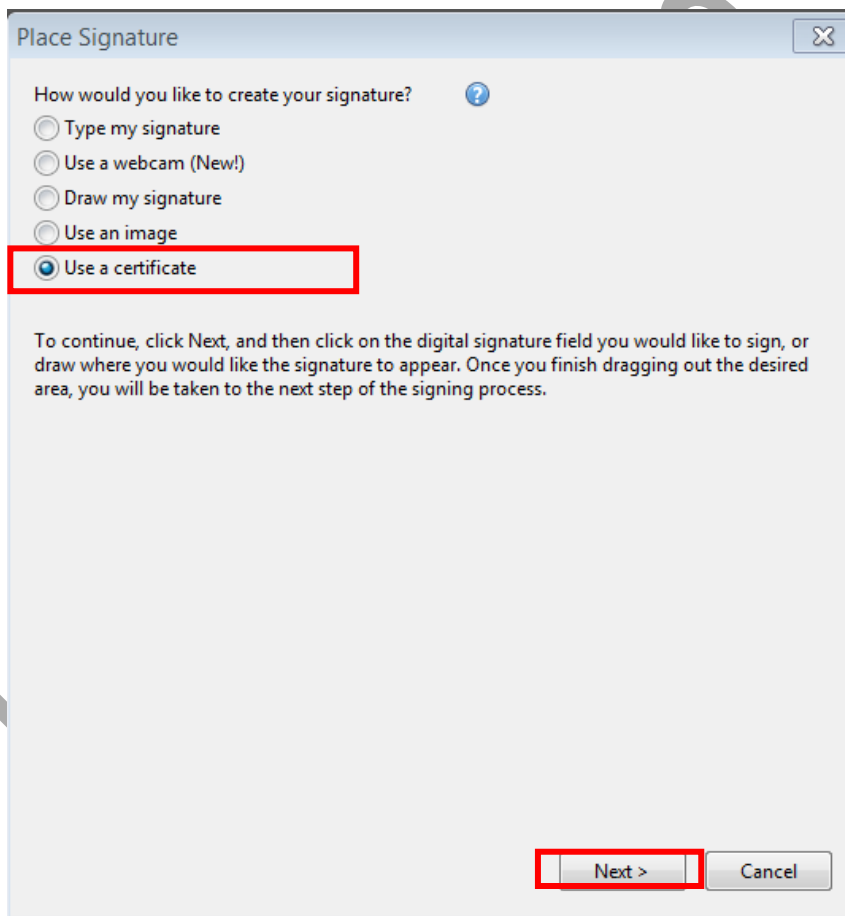
c. Click on "Fill & Sign" in the upper right hand corner.
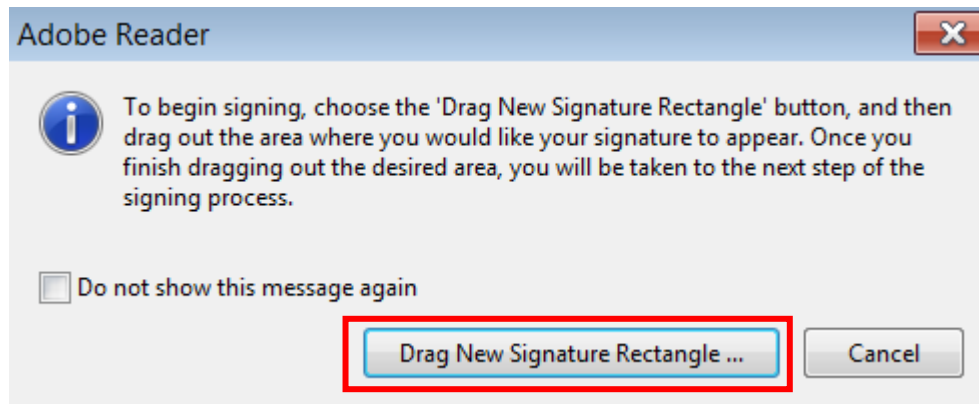
d. The "Fill & Sign" menu will then expand.
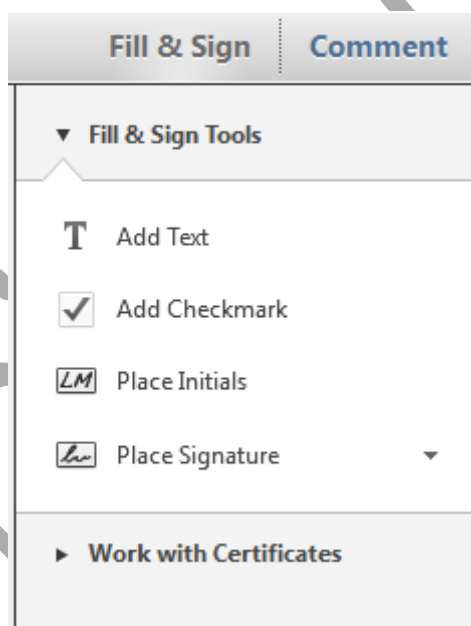
e. Click on "Place Signature."

f. Depending on your version of Adobe, you may or may not get this pop-up. If you have your credentials inserted, then choose to create your signature with "Use a certificate". Then press Next.

Place Signature

How would you like to create your signature?

- Type my signature
- Use a webcam (New!)
- Draw my signature
- Use an image
- **Use a certificate**

To continue, click Next, and then click on the digital signature field you would like to sign, or draw where you would like the signature to appear. Once you finish dragging out the desired area, you will be taken to the next step of the signing process.

Next >   Cancel

g. Another pop-up window will appear. Click on "Drag New Signature Rectangle…"

h. Scroll down through the document to the signature line or where the signature is desired (i.e. – Authorized Signatures and Dates), click and hold the left mouse button, and drag the cursor at an angle away from your starting point.

    NOTE: The rectangular box should measure out to be the same space of the signature line so that the signature will be an adequate size and is readable.

i. A pop-up window will appear. If the "Sign As:" drop down is not already populated with your credentials, use the drop down menu to select your credential.
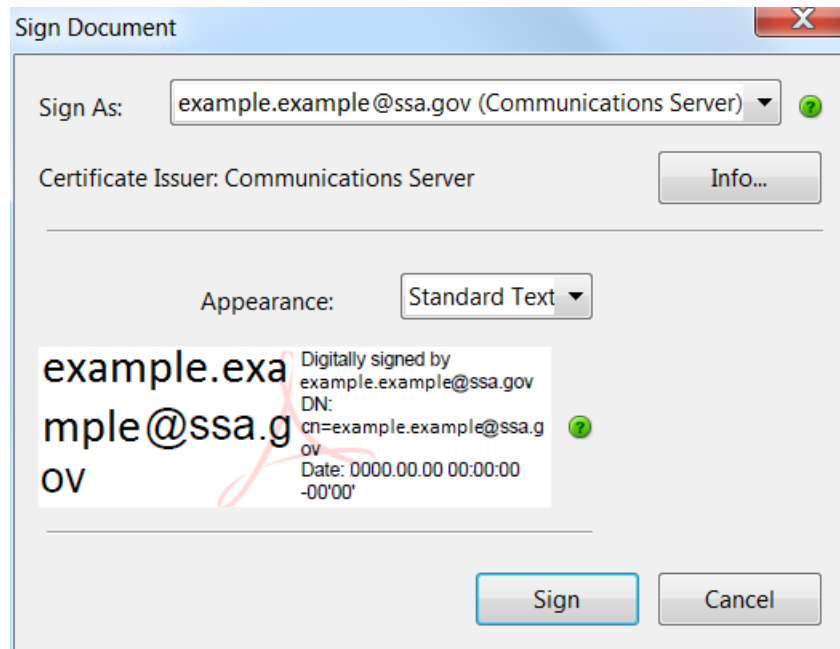
a. If your credential does not appear, verify your credential is in the card reader, then on the 'Sign As' drop down menu select "Refresh ID List."

b. The signature appearance will look similar to the example below:

j. Verify the displayed information is correct. Click "Sign."

Electronic Signature Affirmation: By selecting the [SIGN] button, the user is signing the document electronically. The user is agreeing that their electronic signature has the same legal validity and effect as their handwritten signature on this document, and that it has the same meaning as their handwritten signature.

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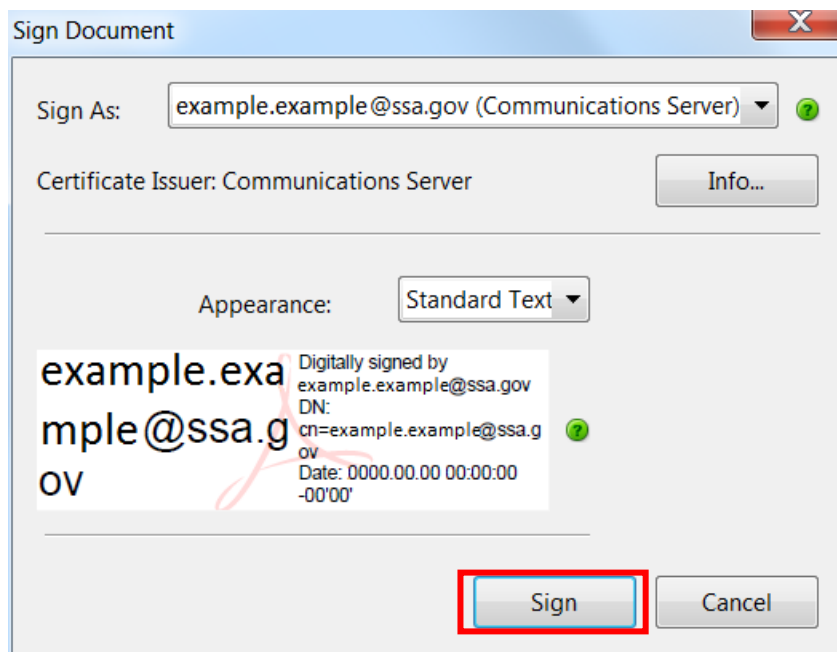
k. The system will prompt you to save the document. You can save the document with its current name or rename the document. Save the document.
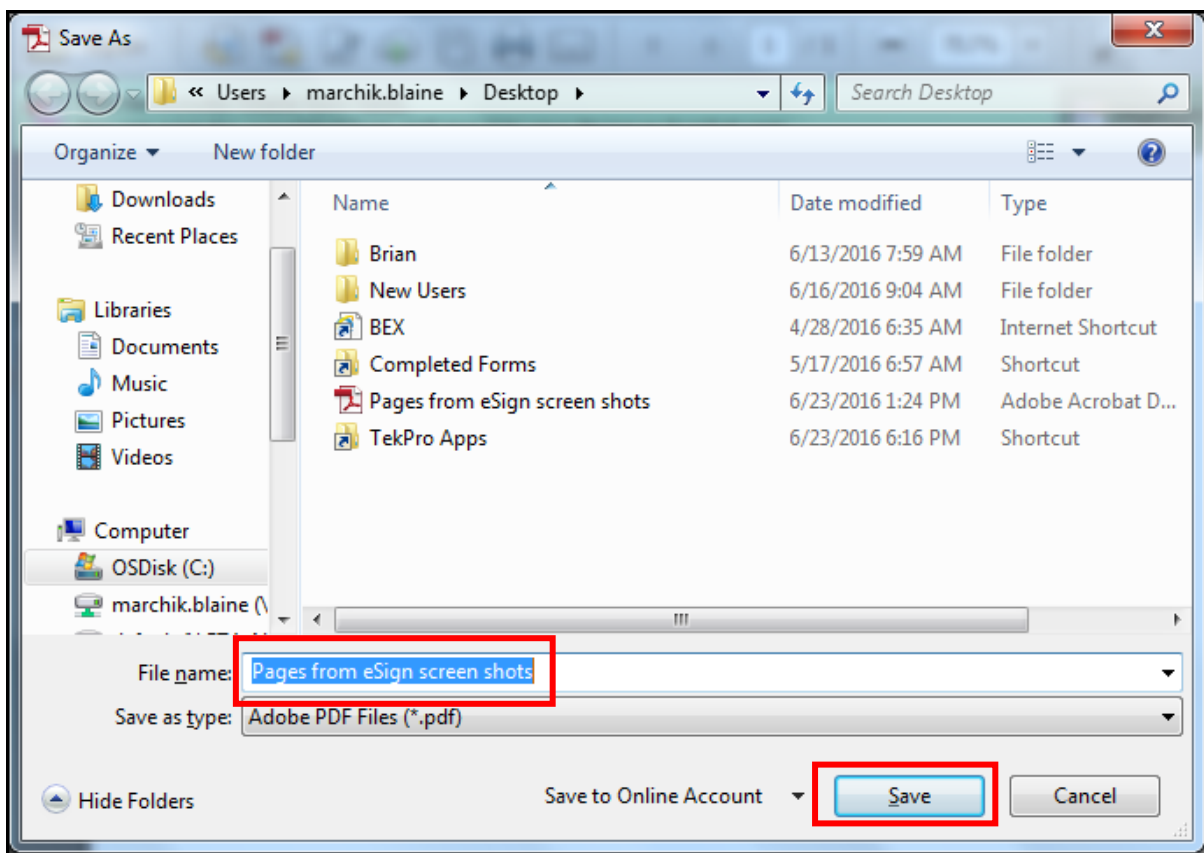
l. A new pop-up window will appear prompting you to enter the PIN associated with your Smart Card credential. Enter the PIN and select "OK."
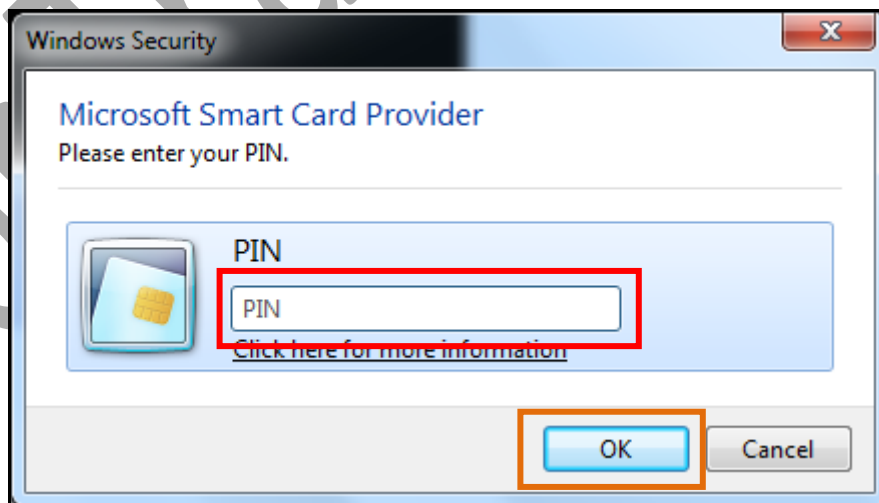
m. After entering your PIN, the digital signature will appear in place of the rectangle.

When all signatures are valid, a message will display that the document is "Signed and all signatures are valid." (Refer to example below.)

NOTE: The "Signed and all signatures are valid" may not always appear. If your digital signature still appears in place of the rectangle, you may proceed.

n. When you sign the document and all signatures are valid, save the signed document and return to the requestor.

NOTE: If there are problems with at least one signature, a message will display reading "At least one signature has problems." (Refer to example below.) If this happens with your signature, you should ensure to correct the issues before sending to the requestor. Otherwise, the signature will not be considered valid.

At least one signature has problems.

AUTHORIZING SIGNATURES AND DATES

The signatories below warrant and represent that they have the competent authority on behalf of their respective agencies to enter into the obligations set forth in this Agreement.

Electronic Signature Affirmation: By selecting the [SIGN] button, the user is signing the document electronically. The user is agreeing that their electronic signature has the same legal validity and effect as their handwritten signature on this document, and that it has the same meaning as their handwritten signature.

SOCIAL SECURITY ADMINISTRATION   XXX

John Doe
Digitally signed by John Doe
DN: cn=John Doe, o=SSA, ou=SSA,
email=john.doe@ssa.gov, c=US
Date: 2018.06.15 09:00:42 -04'00'

[Name]   [Name]
[Title, Office]   [Title, Office]

Date: _____   Date: _____